Introduction

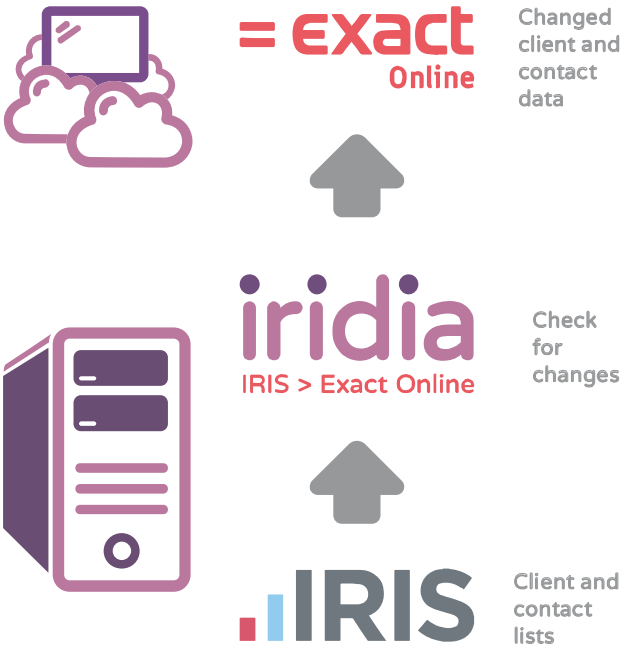
Exact Online Accountancy's real-time visibility of your clients' key financial information provides detailed insight that improves practice efficiency, enabling you to deliver quality services and generate higher fees.

If you're also using IRIS Accountancy Suite for your compliance work then Iridia will continue to improve practice efficiency, by intelligently synchronising your client and contact lists in IRIS Accountancy Suite to Exact Online Accountancy.

What is Iridia?

Iridia is an app for Exact Online that intelligently synchronises your client and contact list in IRIS Accountancy Suite to Exact Online.

- Synchronise IRIS clients of type Person, Business and Trust to Exact Online.
- Synchronise IRIS internal contacts of type Existing Contact and Other Person to Exact Online.
- For existing Contacts in IRIS, synchronise existing client address to address fields in Exact Online.
- Synchronises only the records which have changed in either system, using smart caching to monitor changes.
- Store IRIS client code in Exact Online.



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Iridia compatibility

IRIS

IRIS Accountancy Suite 11.8.0 or above, with:

- Practice Management suite, desktop edition.

Exact

Exact Online UK subscription for:

- Accounting
- Accountancy
- Wholesale Distribution
- Manufacturing
- Time and Billing
- CRM

Back-office

- Client workstations — Windows Vista/7/8/8.1/10.
- Application server — Windows Server 2008/2008 R2/2012/2012 R2
- Database server — Microsoft SQL Server 2008 R2/2012/2014
- Context-sensitive F1 help — Adobe Reader 8 or above

Iridia prerequisites

Your Exact implementation partner will:

- Require access to your SQL Server system administrator password for the IRIS database instance.
- Check your system meets the minimum requirements to ensure a successful implementation.
- Discuss planning and implementing Iridia in your organisation in a managed way.
- As part of the planning discuss your data-cleansing strategy and how this is to be managed.
- Recommend that you nominate a suitable member of your organisation to be responsible for managing and resolving synchronisation conflicts.

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Migration Tool

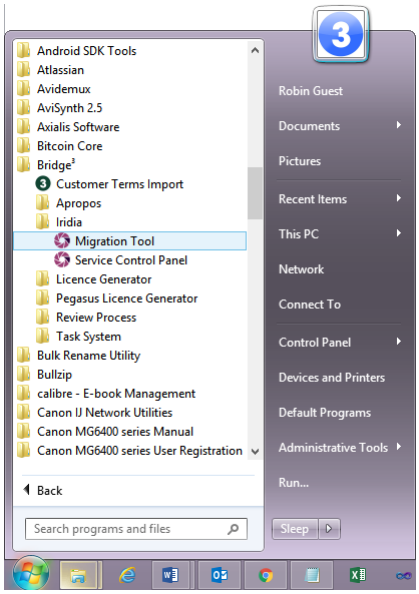
In Iridia you can manually synchronise between IRIS and Exact Online using the Migration Tool.

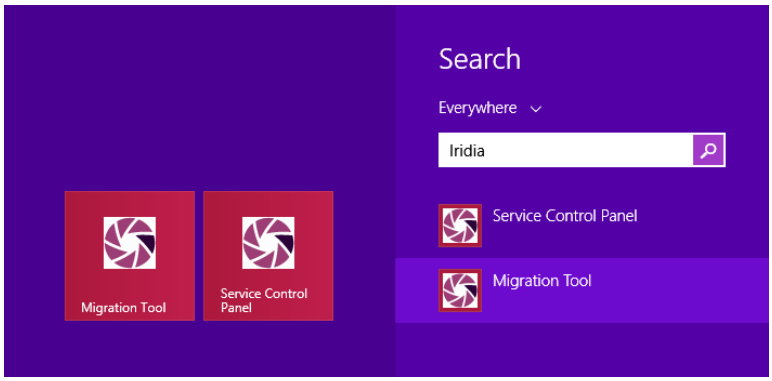
You can also use the Migration Tool to connect to your databases, and conveniently manage your synchronisation settings.

Conflicts can also be reviewed and resolved in the Migration Tool.

Starting the Migration Tool

Launch the Migration Tool from the Bridge[3] | Iridia folder of the Windows Programs menu. Alternatively, search for Iridia on the Windows Start screen.





The first time you start Iridia, you will need to connect to IRIS, the mapping database, and Exact Online.

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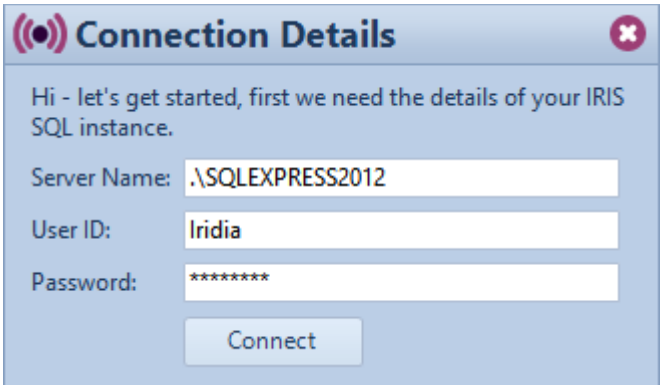
Connecting to IRIS

Enter the IRIS connection details in the Connection Details panel, click the Connect button, and choose the IRIS database.

These connection details were provided to you during the initial installation and setup of Iridia. Make sure you keep them safe!



Server name

This is the Microsoft SQL Server instance that IRIS and the mapping database are hosted on.

User ID

This is the secure SQL Server login that has been especially configured to give read access to IRIS and manage the mapping database.

Password

This is the password associated with the SQL Server User ID above.

Connect button

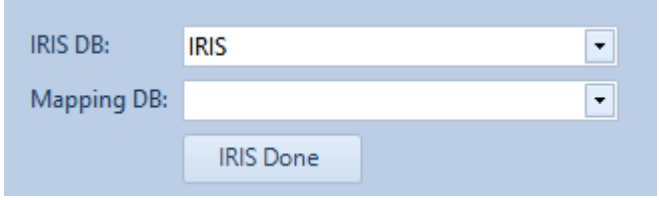
This button establishes a connection with IRIS, and checks that the connection details are all correct.

You would not normally need to click this button during regular use of Iridia, as the connection details are securely stored and the connections are automatically made.

A purple tick will be displayed if the connection is successful.

IRIS DB

This is the SQL Server database that hosts your IRIS Accountancy Suite data.



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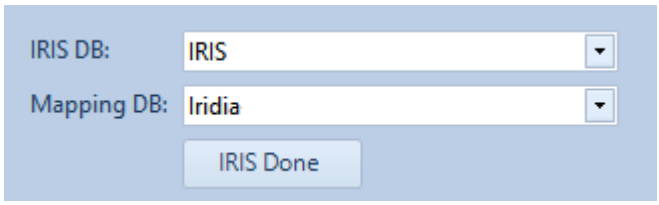
Connecting to the mapping database

Choose the mapping database, and click the IRIS Done button.

Mapping DB

This is the SQL Server database that stores Iridia information.



IRIS Done button

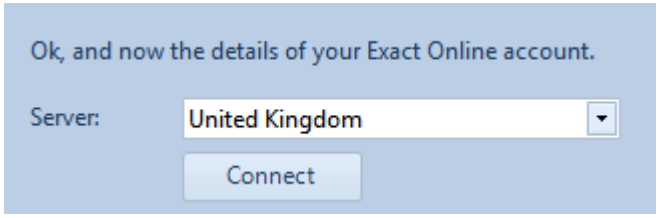
This button establishes a connection with the IRIS and mapping databases, and verifies they contain accountancy and Iridia data, respectively.

A purple tick will be displayed if the connection is successful.

Connecting to Exact Online

Choose the Exact server and click the Connect button. Log in to Exact online, then choose the company to synchronise with IRIS.

Server



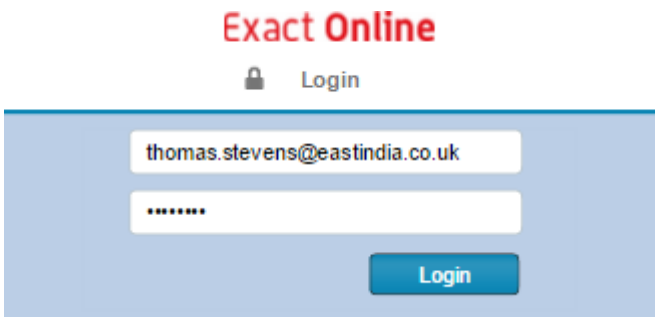
Choose the Exact server you normally use to connect to Exact Online. Iridia is specifically set up to connect to the United Kingdom server, because IRIS is a UK accounting compliance platform.

Connect button

This button connects to Exact Online, and prepares a secure channel for you to log in.

Exact user name

This is the user name you normally use to login to Exact Online.



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Exact password

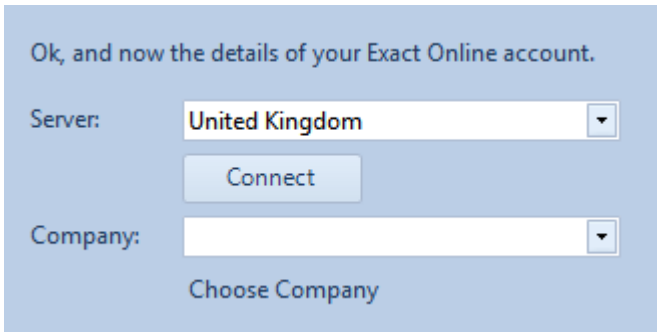
This is the password associated with the Exact user name.

Login button

This button validates your user name and password, and connects to Exact Online.

Company

This is the Exact Online company you want to synchronise to IRIS. Normally it would be your main Exact data set.



After Iridia has synchronised once the Exact company will be locked, to prevent accidently copying data to the wrong place.

A purple tick will be displayed after choosing the company.

Three purple ticks indicate that the connection is complete! If not already licenced, you may be asked to enter your Iridia activation key.

Activating Iridia

The activation screen displays your IRIS and Exact Online registration details, and allows you to enter a Bridge[3] licence key for Iridia.

Iridia Activation
Please verify the details of your systems
Ok, we're connected to your IRIS and Exact Online systems, and now we need to verify the details of your licence.
Licensee name:
East India Company Ltd
IRIS Customer Number:
29146-72
Exact name:
East India Co Ltd
Exact ID:
6918960aebad45a3913edc45d4ef1
No licence key? Click here to arrange purchase.
Your Licence Key:
DMNZY-JTNPH-HYKBT-RFRYG-YXPNI
Confirm
If you don't provide a licence, only the first record from your IRIS system will be exported

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Licensee name

This is the company name registered in your IRIS system.

IRIS customer number

This unique number forms part of your IRIS subscription details.

Exact name

This is the company name registered in your Exact Online subscription.

Exact ID

This unique number forms part of your Exact Online subscription details.

No licence key? Click here to arrange purchase

If you don't have your licence key to hand, this link sends an email requesting a copy.

If you are considering a subscription of Iridia from a trial version, the email provides us with details to complete your subscription.

Your licence key

Your unique activation details, in five blocks of five letters separated by dashes. You can type this or paste it in.

If the key matches your IRIS and Exact details, you will see a purple tick and the Confirm button can be clicked.

Confirm button

Click the button to store your activation details and enable full operation of Iridia.

You can now go on to configure Iridia, do a manual synchronisation, or review any outstanding conflicts.

Running Iridia in demo mode

If you are not able to enter activation details right now, click the close button. Iridia will run in demo mode, synchronising only the first client.

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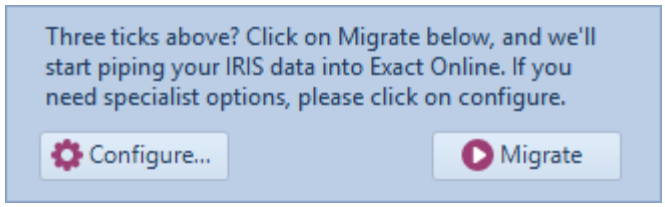
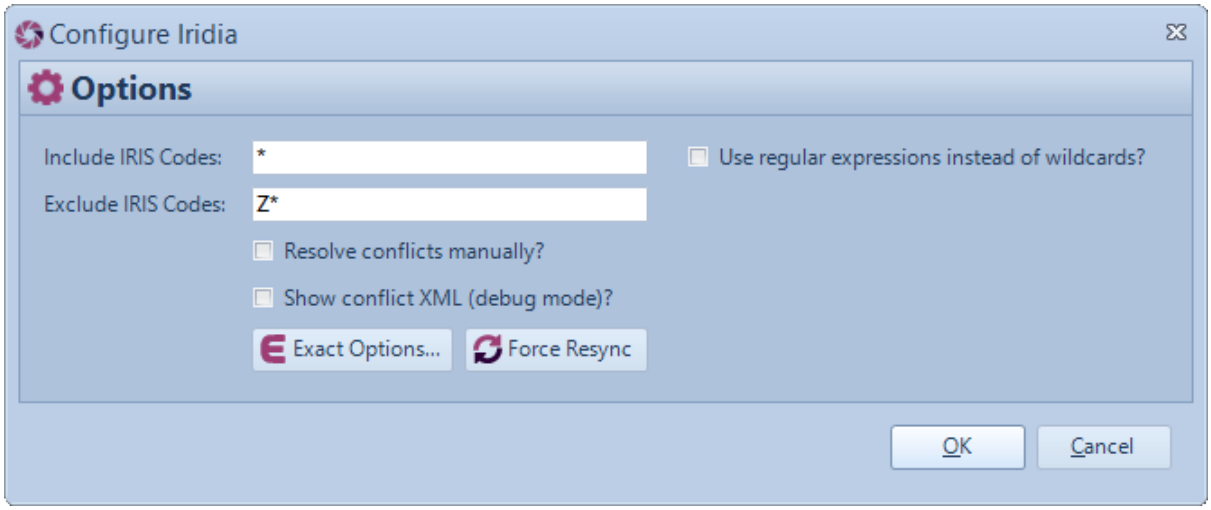
Configuring Iridia

Configure button


Three ticks above? Click on Migrate below, and we'll start piping your IRIS data into Exact Online. If you need specialist options, please click on configure.
Configure...
Migrate

This button opens the configuration options screen.

These options govern how the Migration Tool operates. Apart from the Resolve Conflicts Manually tick box, they also govern how scheduled unattended synchronisations behave.



Include IRIS codes

A wildcard pattern governing which IRIS client codes are synchronised to Exact Online. **?** represents a single character, while * represents any number of characters. You may have used wildcards like this to search for files on a computer.

A wildcard of * means include everything. A wildcard of AB?00? means include anything starting with AB, followed by one character, followed by two zeroes, then one final character.

For other examples, see http://goo.gl/6NrBEn or many other internet sources.

Exclude IRIS codes

Another wildcard pattern, governing which IRIS client codes are *not* synchronised to Exact Online. It is applied after codes have been included by Include IRIS codes.

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For example, including A* and excluding ?D* will sync just those codes in the ranges A0 to AC and AE to AZ (assuming your codes are all alphanumeric).

Leaving this box blank will result in nothing being excluded—which can often be what you need.

Use regular expressions instead of wildcards?

Regular expression are an advanced but standardised way of specifying matching patterns, which come in very useful when you synchronise a highly-specific or complicated set clients.

They are the subject of whole books by themselves, and you are not expected to learn how to write them! But please do let Bridge[3] or your implementation partner know what your synchronisation requirements are, and we will help you achieve them.

When this box is ticked, both the Include IRIS codes and Exclude IRIS codes boxes must contain regular expressions (starting with **^** and ending with **$**).

If you want to find out more about writing regular expressions (also known as regex), http://goo.gl/4dCYc3 is a good place to start.

Resolve conflicts manually?

When this box is ticked, any client which is found to have different details in IRIS and Exact Online won't automatically have the current IRIS details copied over to Exact. Instead they will be marked as a conflict, and can be reviewed and managed on the conflict resolution screen.

Clients which are being created for the first time, or which are identical in IRIS and Exact, are unaffected by this setting.

The scheduled automatic synchronisation uses a separate Require Approval of Update Exceptions setting, to allow for more flexibility.

Show conflict XML (debug mode)?

Ticking this box makes the conflict resolution screen display the IRIS and Exact client records in XML format, instead of formatted text.

Sometimes this setting can help with troubleshooting problems, but you won't normally need to activate it.

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Exact Options button

Clicking this button lets you configure some Iridia options that are specific to Exact Online.

Force Resync button

Normally Iridia uses a smart checking method to determine whether client records have changed in either IRIS or Exact Online. For reasons of speed and efficiency, it only attempts to synchronise records it thinks really have changed since the synchronisation was last performed.

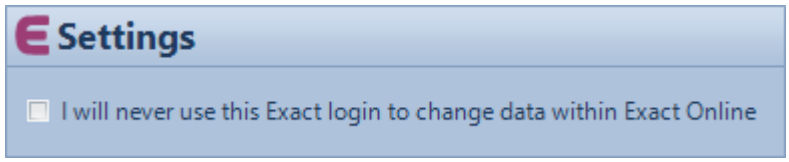
Occasionally, however, Iridia can get fooled, for example when one or the other system has been restored from backup. If this happens you might notice discrepancies creeping in between the two systems.

The Force Resync button is way of correcting this. Clicking it tells Iridia to check every client record it knows about (in either system) next time synchronisation occurs. This could make the process take longer, just that one time only, since a lot more Exact data has to be downloaded from the Cloud to do thorough checks.

This setting also effects the next time the scheduled automatic synchronisation occurs. Whichever one happens first will be a forced resync.

Configuring Exact options in Iridia

I will never use this Exact login to change data within Exact Online



Ticking this box can sometimes speed up Iridia synchronisation runs, particularly if many changes are being made in either IRIS or Exact Online. In particular, it cuts down on the amount of Exact data which has to be downloaded from the Cloud.

However, you must be certain that Iridia's Exact login is never used to make changes within the CRM module! The easiest way to ensure this is to secure the Exact password for that user, so that nobody else knows it.

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If you do tick this box accidentally then records changed in Exact may not always be synchronised. But don't worry too much—a Force Resync will always sort out any discrepancies between the two systems.

States

IRIS has a fairly laissez-faire approach to storing addresses—states (counties) and countries aren't mandatory, and there are no restrictions to the states and countries you can enter.

Exact Online, on the other hand, has a mandatory country for each address, which has to be picked from a standard list. For countries with states defined in Exact, the state is mandatory too, and must also be picked from a standard list.

This all makes synchronisation quite difficult, as many IRIS addresses normally would be rejected as invalid by Exact. To get around this, every time a state or country is rejected as invalid, Iridia keeps track of it, and lets you assign it to one of the standard Exact values.

Alternatively, you can choose to change the state or country in IRIS instead, to one which will match Exact.

IRIS state

All IRIS states rejected by Exact are shown in this column. Choose an Exact country and Exact state from the dropdown lists, and next time those particular client record(s) are synchronised they will be given these values.

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Exact country

This column contains the ISO standard list of countries. Pick the country to which this state belongs. This will filter the list in the next column.

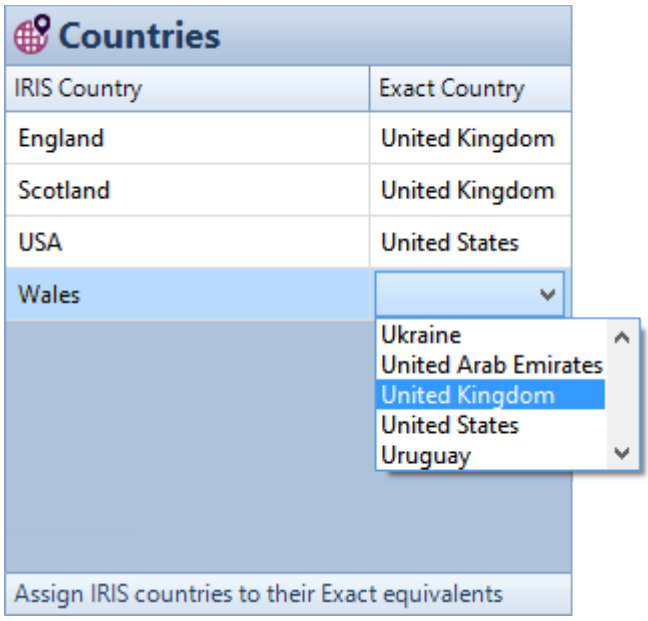
Exact state

This column contains all the states Exact Online will accept for the country in the previous column. Some countries like the UK and Australia have a full list. Many other countries have none defined, so this is the only selectable option.

Any states where you have specified an Exact country and Exact state will be remembered when you click OK, and won't be displayed next time you open this screen.

Countries

IRIS countries are mapped to exact countries in a similar way to states.



IRIS country

All IRIS counties rejected by Exact are shown in this column. Choose an Exact country from the dropdown list, and next time those particular client record(s) are synchronised they will be given this value.

Exact country

This column contains all the ISO standard countries Exact Online will accept for the country in the previous column.

Any countries you have chosen a matching value will be remembered when you click OK, and won't be displayed next time you open this screen.

Classifications

There are no general-purpose custom fields in Exact Online, currently, so the most important IRIS client data is synchronised into standard Exact fields. Two very useful fields, however, are the IRIS client type and business type. Iridia can optionally synchronise these to Exact classifications.

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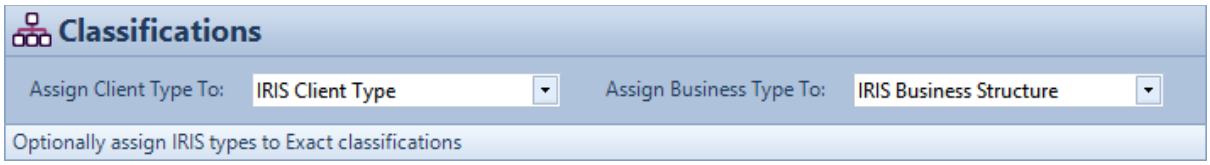

Assign client type to

Choose the Exact classification in which the client types have been entered.

The classification may have been created in Exact Online by your implementation partner. You can create them yourself in the Exact Online master data screen. Create a Property for every client type. The code can be anything, but the description must exactly match this list:

- Person
- Business
- Trust

Assign business type to

Choose the Exact classification in which the business types have been entered.

The classification may have been created in Exact Online by your implementation partner. You can create them yourself in the Exact Online master data screen. Create a Property for every client type. The code can be anything, but the description must exactly match this list:

- Person
- Limited company
- Partnership
- Sole trader
- Other
- Trust
- LLP
- Charity incorporated
- Charity Unincorporated
- Bare Trust
- Unauthorised Unit Trust
- Estate in Administration
- Interest in Possession
- Discretionary Trust
- Disabled Persons Trust
- Employment Related Trust
- Accumulation or Maintenance Trust
- Heritage Maintenance Fund
- Charity
- Charitable Trust
- FURBs
- Employer Financed Retirement Benefit Scheme (EFRBS)

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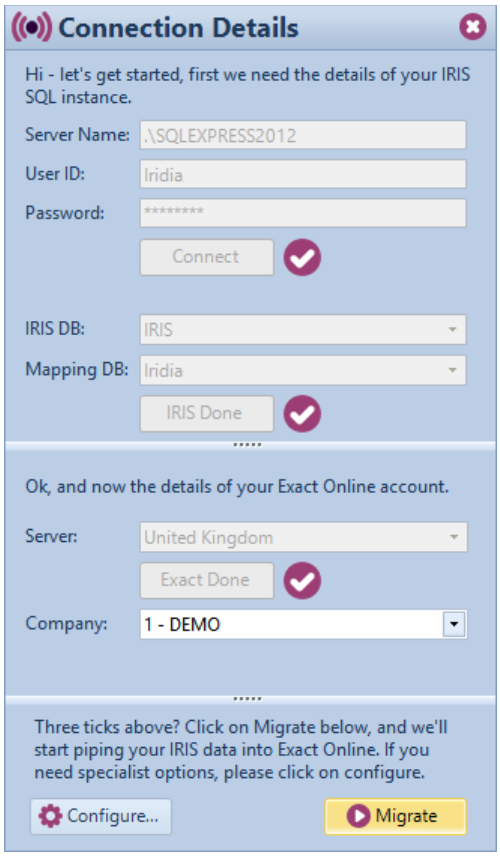
Synchronisation


Connection Details
Hi - let's get started, first we need the details of your IRIS SQL instance.
Server Name: .\SQLEXPRESS2012
User ID: Iridia
Password: ********
Connect
IRIS DB: IRIS
Mapping DB: Iridia
IRIS Done
Ok, and now the details of your Exact Online account.
Server: United Kingdom
Exact Done
Company: 1 - DEMO
Three ticks above? Click on Migrate below, and we'll start piping your IRIS data into Exact Online. If you need specialist options, please click on configure.
Configure...
Migrate

At the heart of Iridia is the synchronisation process, whether triggered manually in the Migration Tool, or scheduled automatically by the Iridia Windows service.

Migrate

The Migrate button manually starts the Iridia synchronisation process, which proceeds in a number of stages.

The progress log, progress bar and status bar keep you updated how things are going.

At any time during syncing, the abort button safely stops the process.

Licence check

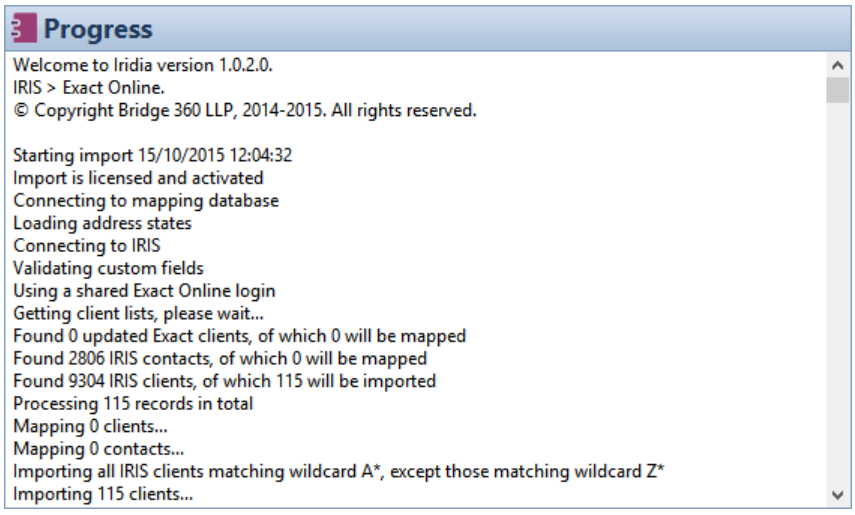
If the Iridia activation key is not present then the synchronisation lets you know you it is operating in demo mode, and only process one client record.

Connecting and validating databases

Iridia always needs to connect to IRIS, the mapping database and Exact Online, and the progress log tells you if there have been any problems.

Getting client lists

Iridia checks which records have changed in IRIS and Exact since the last synchronisation, and marks them for more detailed investigation.


Progress
Welcome to Iridia version 1.0.2.0.
IRIS > Exact Online.
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Starting import 15/10/2015 12:04:32
Import is licensed and activated
Connecting to mapping database
Loading address states
Connecting to IRIS
Validating custom fields
Using a shared Exact Online login
Getting client lists, please wait...
Found 0 updated Exact clients, of which 0 will be mapped
Found 2806 IRIS contacts, of which 0 will be mapped
Found 9304 IRIS clients, of which 115 will be imported
Processing 115 records in total
Mapping 0 clients...
Mapping 0 contacts...
Importing all IRIS clients matching wildcard A*, except those matching wildcard Z*
Importing 115 clients...

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Mapping clients and contacts

Iridia checks whether previously synced records have changed the IRIS code linking them together, and attempts to delink any duplicates.

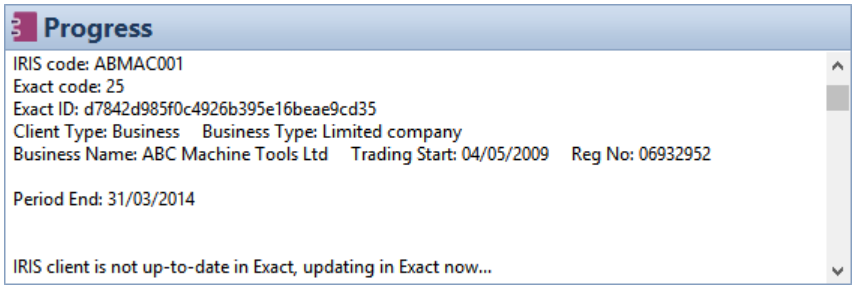
Importing clients

Each record suspected to have changed will be investigated in more detail, by comparing the versions in IRIS and Exact.

This is the main time-consuming stage of synchronisation, so how long it takes will depend on the scale of changes. The first synchronisation is likely to take much longer than subsequent ones, and infrequently scheduling of the automatic sync process will probably need to look at more records each time.

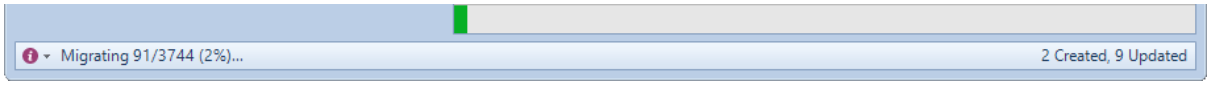
Additionally, the exclusive Exact login setting can have an effect on synchronisation times.

Summary of each client sync


Progress
IRIS code: ABMAC001
Exact code: 25
Exact ID: d7842d985f0c4926b395e16beae9cd35
Client Type: Business Business Type: Limited company
Business Name: ABC Machine Tools Ltd Trading Start: 04/05/2009 Reg No: 06932952
Period End: 31/03/2014
IRIS client is not up-to-date in Exact, updating in Exact now...

The progress log displays a short summary of the IRIS and Exact codes, the type of client, whether it has changed, and whether synchronisation was successful (or the client was marked for later conflict resolution).

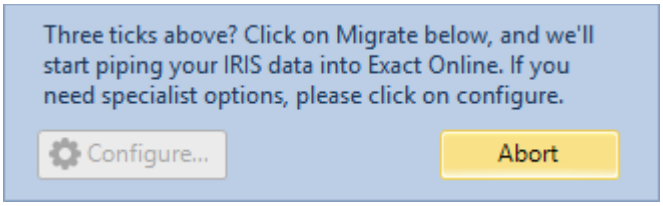
Progress and status bars



The progress and status bars give you an indication of how far along the synchronisation process has got, and how many client records have been modified in Exact Online.

Abort button

At any time during syncing, the abort button safely stops the process.


Three ticks above? Click on Migrate below, and we'll start piping your IRIS data into Exact Online. If you need specialist options, please click on configure.
Configure...
Abort

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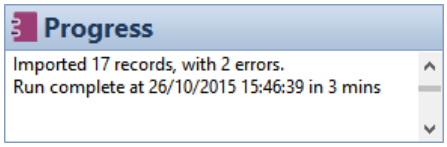
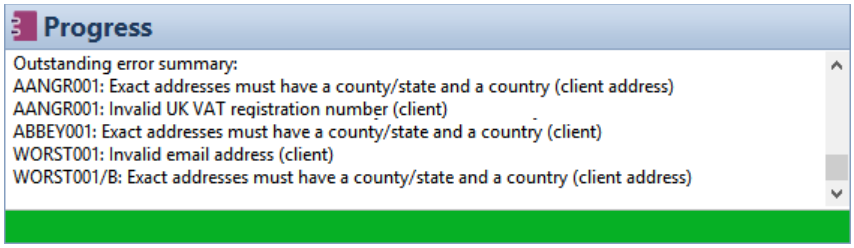
Completion statistics

After every client has been processed, the log shows a summary of how many records were synchronised, and how long it took.



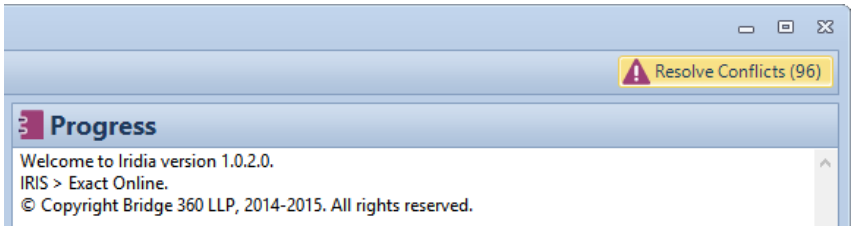
Error summary

The error summary gives you a cumulative reminder of all the unresolved synchronisation errors Iridia has encountered. Most of these will be validation problems, typically requiring the record to be edited in IRIS.


Progress
Outstanding error summary:
AANGR001: Exact addresses must have a county/state and a country (client address)
AANGR001: Invalid UK VAT registration number (client)
ABBEY001: Exact addresses must have a county/state and a country (client)
WORST001: Invalid email address (client)
WORST001/B: Exact addresses must have a county/state and a country (client address)

Resolve conflicts button

The Resolve Conflicts button launches the conflict resolution screen, allowing you to manage and resolve synchronisation problems.


Resolve Conflicts (96)
Progress
Welcome to Iridia version 1.0.2.0.
IRIS > Exact Online.
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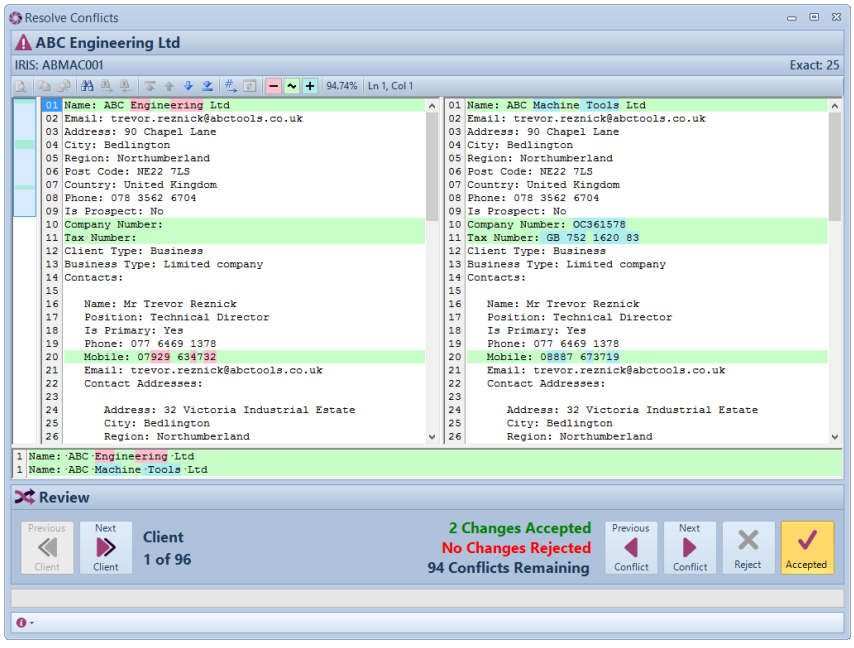
Resolving conflicts

The conflict resolution screen allows you to see where client records differ between IRIS and Exact in a visual manner, and lets you accept or reject updates to Exact in a controlled way.



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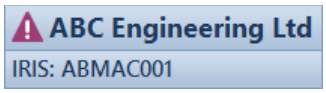
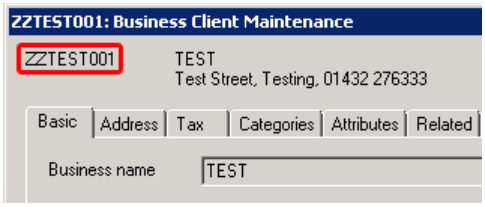
IRIS code





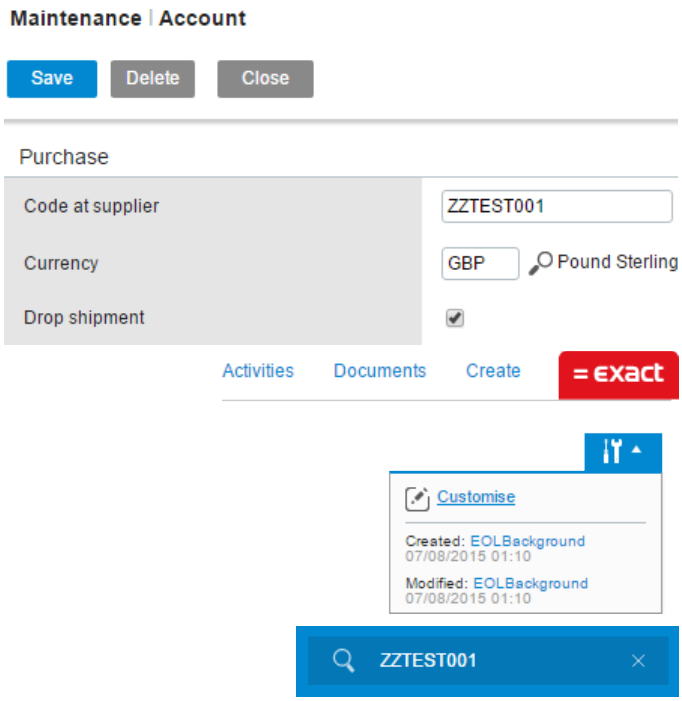
The IRIS code is the main identifier of the client account. It serves as the main link to tie the IRIS client to the Exact account.

Displaying the IRIS code in Exact Online

The IRIS code is displayed in Exact Online in the CRM account's Purchase Code At Supplier field.

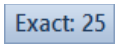
Note that you may need to customise the account maintenance screen in order to display the Code At Supplier field.

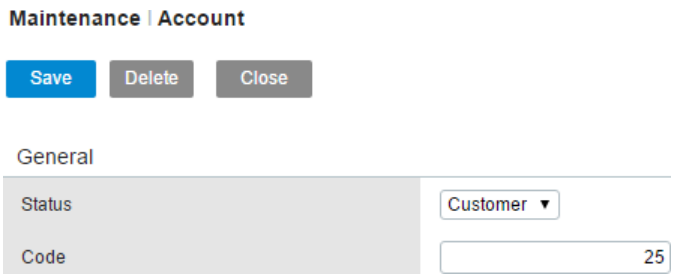
Code at Supplier is a searchable field in Exact.



Exact code

The Exact code is stored in the General section of the CRM account maintenance screen.





Comparison pane

The comparison pane shows you all the differences between the record values in IRIS (on the left hand side) and Exact (on the right hand side).

Lines which have differences on them are highlighted in **green**. Added characters are marked in **blue**, and deleted characters in **red**.

The toolbar buttons can be used to navigate between all the conflicts in the client record.

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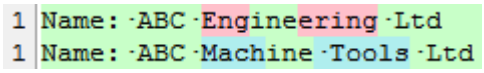
The third pane shows a direct comparison of the currently selected line.



Previous client button

This button cycles back through all of the clients currently shown on the conflict resolution screen.

Next client button

This button cycles forward through all of the clients currently shown on the conflict resolution screen.

Previous conflict button

This button cycles back through all of the outstanding conflicts. Unlike the previous client button, it skips accepted and rejected records, and wraps round to the end when it reaches the beginning.

Next conflict button

This button cycles forward through all of the outstanding conflicts. Unlike the next client button, it skips accepted and rejected records, and wraps round to the beginning when it reaches the end.

Reject button

Clicking this button marks the conflict as resolved, without changing the current values in Exact. It won't be flagged up as a conflict again until the record changes further in either IRIS or Exact.

Typically, you would reject a conflict if there was a trivial difference between two values in IRIS or Exact, or if the IRIS record was wrong but you didn't currently have information available to correct it.

Triggering a Force Resync causes all previously rejected records to be re-compared during the next synchronisation, and marked as conflicts again. Often this is what you want, but be aware of this possibility before making heavy use of this workflow.

Clicking the button on an accepted or unresolved record marks it as rejected. Clicking it on a rejected record converts it back to unresolved.

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Rejections get applied when the conflict resolution screen is closed. Until then, you can use the navigation buttons to reconsider your decision.

Accept button

Clicking this button approves the current values of the IRIS record for updating to Exact when the conflict resolution screen is closed. Until then, you can use the navigation buttons to reconsider your decision.

Clicking the button on a rejected or unresolved record marks it as accepted. Clicking it on an accepted record converts it back to unresolved.

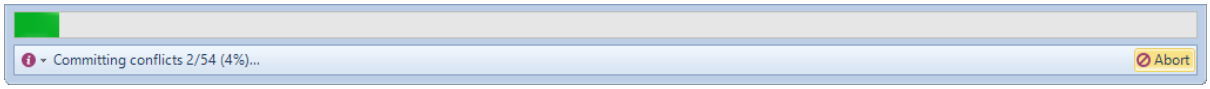
Essentially, accepting a conflicted client record treats it the same as if the resolve conflicts manually/require approval of update exceptions settings were not ticked.

Accepted records are still subject to validation and potential synchronisation failure when the conflict resolution screen is closed. If this occurs, any errors or warnings are displayed on the conflict errors screen.

Review pane

As well as the navigation and resolution buttons, the review pane shows which conflict record you are currently managing, plus a summary of the accepted, rejected and outstanding conflicts.

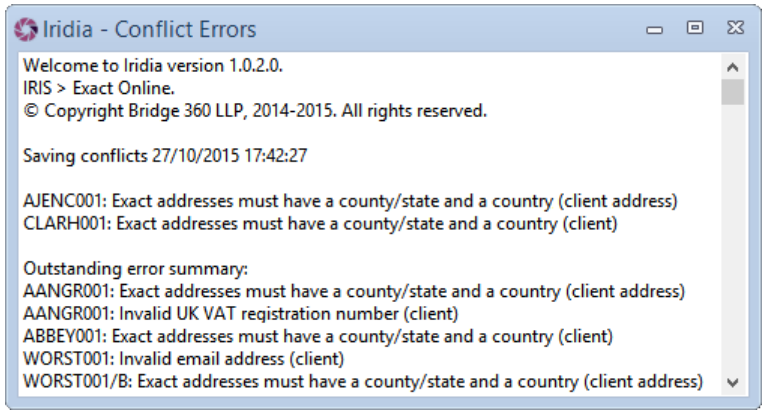
Progress and status bars



Committing conflicts can take a while, so at any point after closing the form you can monitor progress, and also stop the update with the abort button.

Conflict errors screen

Any validation errors and update problems are displayed after the conflict resolution screen has been closed, along with an error summary.


Iridia - Conflict Errors
Welcome to Iridia version 1.0.2.0.
IRIS > Exact Online.
© Copyright Bridge 360 LLP, 2014-2015. All rights reserved.
Saving conflicts 27/10/2015 17:42:27
AJENC001: Exact addresses must have a county/state and a country (client address)
CLARH001: Exact addresses must have a county/state and a country (client)
Outstanding error summary:
AANGR001: Exact addresses must have a county/state and a country (client address)
AANGR001: Invalid UK VAT registration number (client)
ABBEY001: Exact addresses must have a county/state and a country (client)
WORST001: Invalid email address (client)
WORST001/B: Exact addresses must have a county/state and a country (client address)

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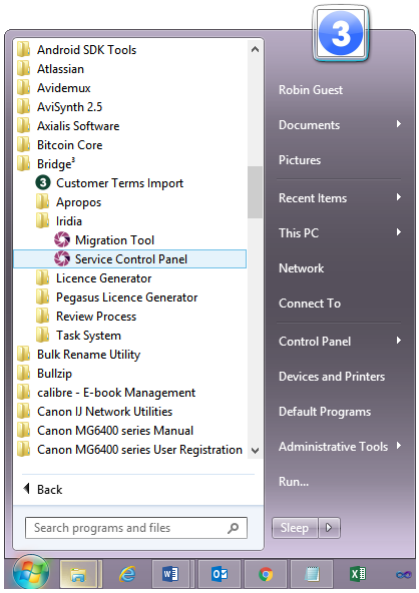
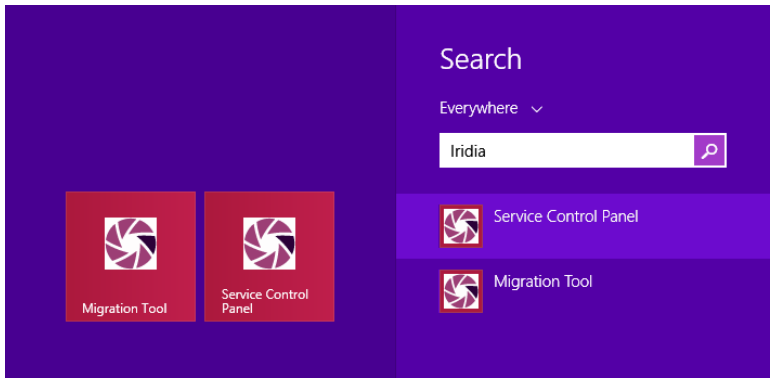
Service Control Panel

You can configure the scheduling and notification settings of Iridia's automatic scheduled synchronisation feature, using the Service Control Panel.

Starting the Service Control Panel

Launch the Service Control Panel from the Bridge[3] | Iridia folder of the Windows Programs menu. Alternatively, search for Iridia on the Windows Start screen.





Connection details

The first time you start Iridia, you will need to connect to IRIS, the mapping database, and Exact Online.

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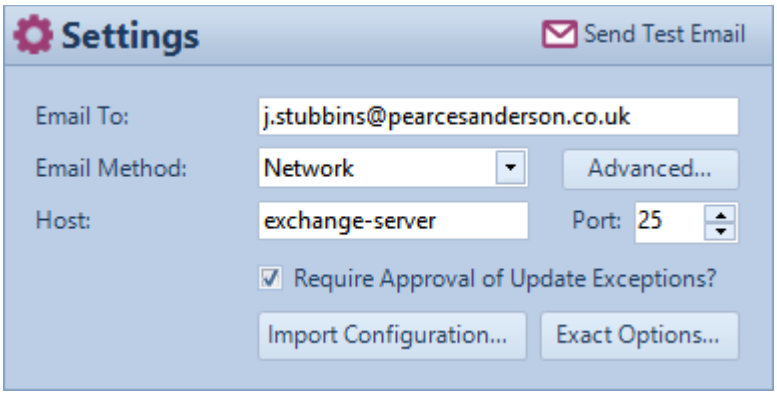
Settings



Email to

This optional setting allows you to send synchronisation status reports to one or more email addresses.

Separate email addresses with a semicolon.

If you leave this box blank, no status reports will be emailed, and the remaining email settings do not need to be specified.

Email method

Choose between Network and Pickup Directory.

Network connects directly to a designated SMTP server to send outgoing emails, whereas Pickup Directory saves outgoing emails in a designated location, from which an SMTP server can pick up and send them.

Host

The host name or IP address of the SMTP email server.

Port

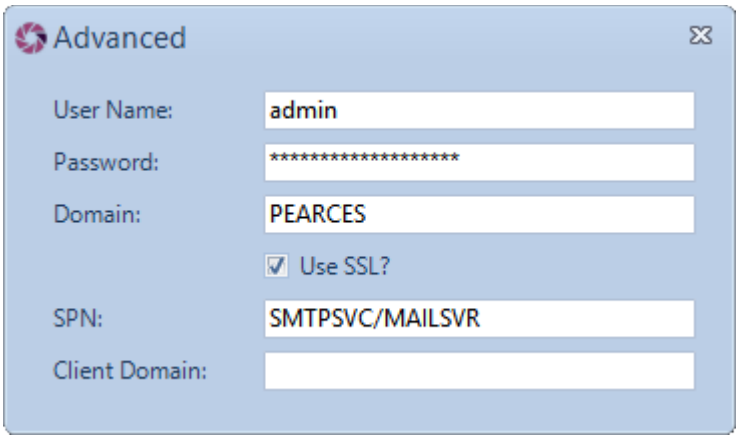
The port number the SMTP email server is configured to receive connections on.

Directory

A local directory that is configured as a pickup location for the SMTP email server.

Advanced button

The button opens a screen where additional email settings can be configured.



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User name

Optionally specify the user name associated with the SMTP server login credentials.

Password

Optionally specify the password associated with the SMTP server login credentials.

Domain

Optionally specify the name of the domain or realm associated with the SMTP server login credentials.

Use SSL

Optionally specify whether Secure Sockets Layer (SSL) should be used to access the SMTP mail server.

SPN

Optionally specify the Service Provider Name (SPN) to use for authentication when using extended protection.

The default value is of the form SMTPSVC/<host> where <host> is the hostname of the SMTP mail server.

Client domain

Optionally specify the client domain name used in the initial SMTP protocol request to the SMTP server. If not set, the localhost name of the local computer sending the request will be used.

Send test email button

Use this button to send a test email using the current settings configured in the Service Control Panel.

This can be useful to troubleshoot any connection or delivery problems, and ensure notifications are correctly set up before scheduling any synchronisations.

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Require approval of update exceptions

When this box is ticked, any client which is found to have different details in IRIS and Exact Online won't automatically have the current IRIS details copied over to Exact. Instead they will be marked as a conflict, and can be reviewed and managed on the conflict resolution screen.

Clients which are being created for the first time, or which are identical in IRIS and Exact, are unaffected by this setting.

The Migration Tool uses a separate Resolve Conflicts Manually setting, to allow for more flexibility.

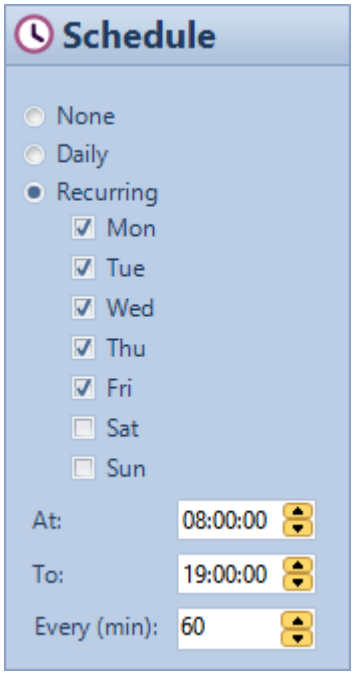
Import configuration button

This button opens the configuration options screen.

Exact options button

This button opens the Exact options screen.

Schedule



Specify exactly when and how often you want IRIS data to be automatically synchronised with Exact Online.

None

Choosing this option disables automatic synchronisation.

Manual synchronisation can still be triggered using the Migration Tool.

Daily

Choosing this option allows you to schedule synchronisation once every day, seven days a week, at a designated time.

Recurring

Choosing this option allows you to freely schedule synchronisation on one or more days of the week, every so often during a block of time.

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At

The time of day to start a daily synchronisation.

The start of the period of time for a recurring synchronisation.

To

The end of the period of time for a recurring synchronisation.

Every (min)

How often a recurring synchronisation will occur between the start and end times.

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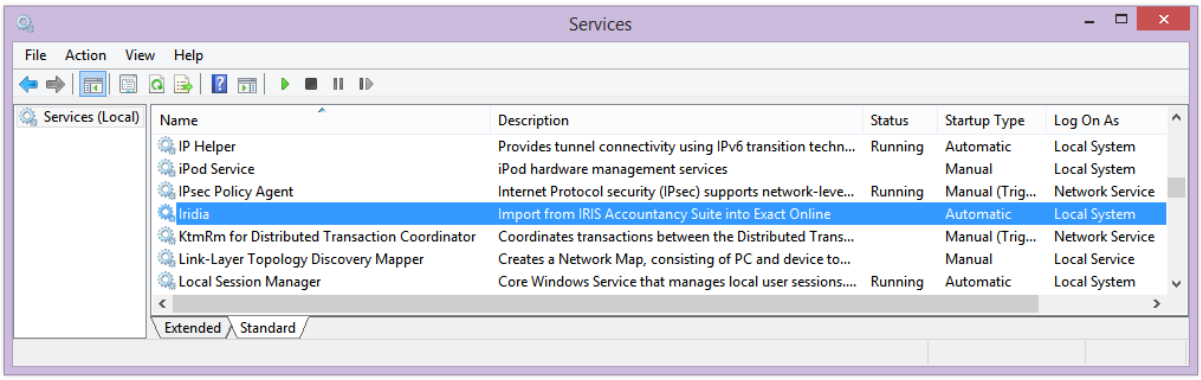
Iridia Service

The Iridia service runs on a Windows server (or a designated workstation), and performs automatic scheduled synchronisations. Results are emailed to designated recipients, who can review the contents or resolve conflicts.

The service is automatically started after Iridia installation, and on Windows startup. It can also be started and stopped on demand.

Service control manager

The Microsoft Management Console (MMC) Services Snap-in lets you view and configure properties for services running on the system. You can disable, start, stop or restart services; configure authentication and fault tolerance.



Starting and stopping the Iridia service

Highlight the Iridia service, and click the start ▶ and ■ stop toolbar buttons to start and stop the service.

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Log on as

The Iridia service runs under the Local System account. It doesn't need to interact with the desktop.

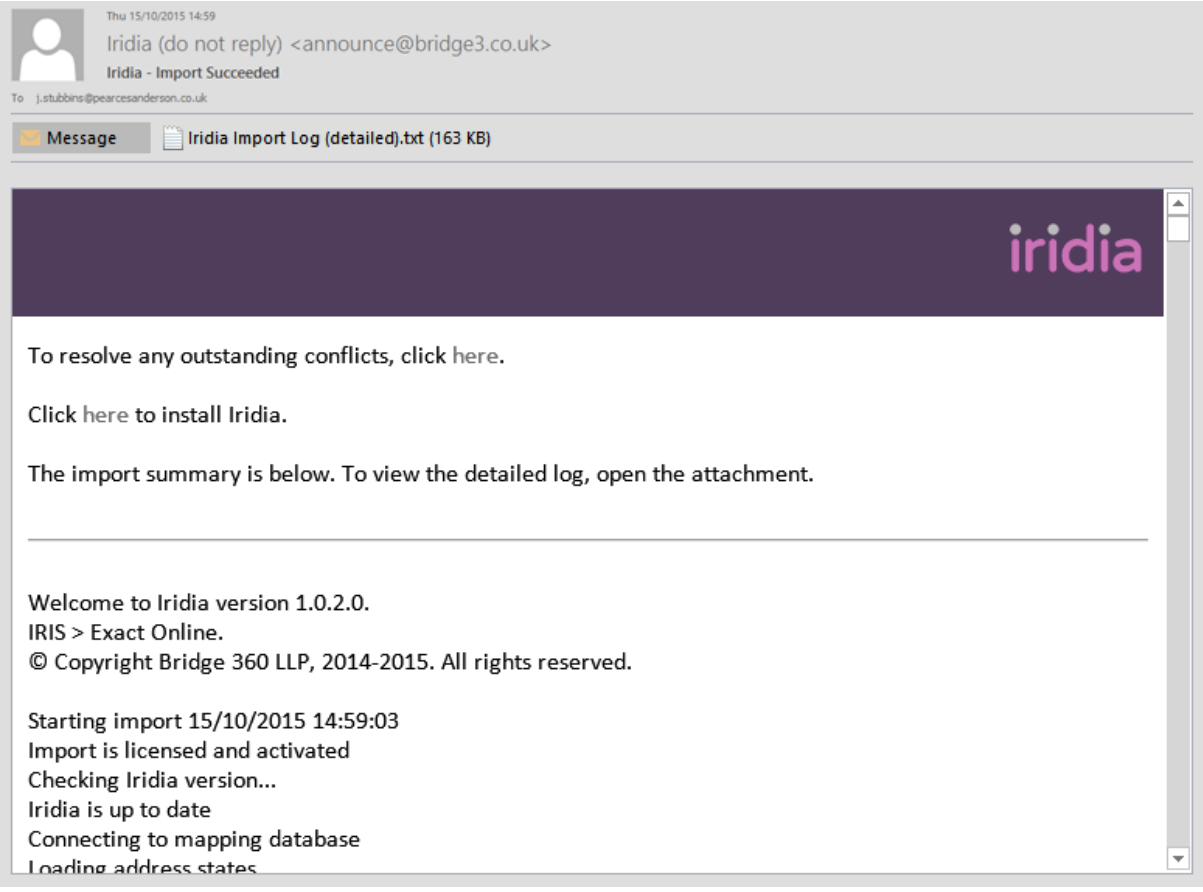
Scheduled synchronisations

The Iridia service starts an automatic synchronisation at the times scheduled by the Service Control Panel.

The process is essentially the same as the manual synchronisation performed by the Migration Tool.

The results are captured in log files, and optionally emailed to designated recipients.

Email notifications


Thu 15/10/2015 14:59
Iridia (do not reply) <announce@bridge3.co.uk>
Iridia - Import Succeeded
To j.stubbins@pearcesanderson.co.uk
Message
Iridia Import Log (detailed).txt (163 KB)
iridia
To resolve any outstanding conflicts, click here.
Click here to install Iridia.
The import summary is below. To view the detailed log, open the attachment.
Welcome to Iridia version 1.0.2.0.
IRIS > Exact Online.
© Copyright Bridge 360 LLP, 2014-2015. All rights reserved.
Starting import 15/10/2015 14:59:03
Import is licensed and activated
Checking Iridia version...
Iridia is up to date
Connecting to mapping database
Loading address states

From address

The email is sent from announce@bridge3.co.uk. This address is not monitored for replies.

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Notification emails can occasionally be mishandled as spam by your email server. If this happens, whitelist announce@bridge3.co.uk or add it to your address book.

Subject

The email subject will be Iridia - Import Succeeded (n Conflicts) or Iridia - Import FAILED. You may use this pattern to set up inbox filters.

Synchronisation summary

A shortened form of the synchronisation results appears in the body of the email.

Detailed synchronisation log

The full synchronisation results are attached to the email in a text file.

Resolve conflicts link

Click on the Resolve Outstanding Conflicts link in the email to open the conflict resolution screen.

This only works if you have the Migration Tool installed on your computer. If you don't, you can install it by clicking on the upgrade/install link in the email.

Upgrading/installing Iridia

The email contains a link to download the Iridia installer.

If a new version of Iridia is available, the email contains a link to download an installer to upgrade Iridia to the latest version.

You may need administrator privileges on your computer to install or upgrade Iridia. You may also need configuration details from your Exact implementation partner to set up your database connections.

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Logs

Service log

Each time the Iridia service is started or stopped, and each time a scheduled synchronisation is triggered, it is recorded in a log file located at:

C:\ProgramData\Bridge\Iridia\IridiaService.log

Scheduler log

Each time the synchronisation schedule is changed, the new details are recorded in a log file located at:

C:\ProgramData\Bridge\Iridia\IridiaScheduler.log

Import logs

Each time a scheduled synchronisation completes, the results are recorded in a new log file located in the following directory:

C:\ProgramData\Bridge\Iridia\ImportLogs

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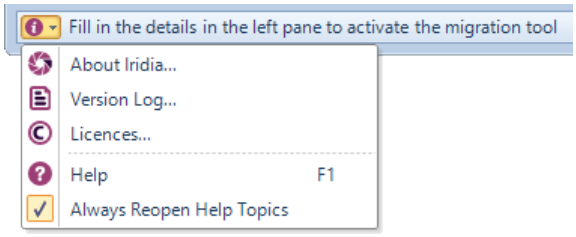
Appendix

Info menu

The Info menu is located at the bottom left hand corner of the Migration Tool, conflict resolution screen and Service Control Panel.


Fill in the details in the left pane to activate the migration tool
About Iridia...
Version Log...
Licences...
Help F1
Always Reopen Help Topics

About Iridia

This screen shows the version of Iridia currently installed. Your implementation partner may ask you for this information while troubleshooting any problems.

Version log

This screen lists major changes and bug fixes included in each new version of Iridia.

Licences

This screen shows details and licences of all the open source and third-party software included in Iridia.

F1 help

Choosing this menu option, or typing F1 anywhere in Iridia will open this help manual.

To get detailed context-specific help, click on a particular box, field or button before hitting the F1 key.

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F1 help requires Adobe Reader to be installed on your computer. The latest version can be downloaded from https://get.adobe.com/uk/reader/

Always reopen help topics

In order to jump to a particular help topic when you hit F1, Adobe Reader needs to close and reopen the help document.

While this is can be a useful feature, we recognise it is not always desirable, so you can turn off the behaviour by unticking this menu item.

When unticked, Adobe Reader will remain open, but may not always jump to the expected section when you hit the F1 key.

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